

From Request to Practice

A nine-step process map for conversation skills and behavior change training

Drawn from one real engagement: GRACE Conversations, designed with Hope Community Resources, Inc., an Alaska nonprofit, in early 2026. In practice it is a hybrid of SAM (Successive Approximation Model) and ADDIE (Analysis, Design, Development, Implementation, Evaluation) in a non-linear, real-world engagement: steps overlap and loop back.

The wraparound: evaluation, from step 1 to step 9. Two questions sit over every step: How will we know it worked? How will it carry into behavior? Ask them in the first discovery call, because the answers change what you ask next. Day-of reactions are one data point. Behavior and results usually show up after you leave, so step 9 is planning that with the client and helping them see the value in it.

Step	What happened at Hope	Ask yourself	Watch for
1. Listen first	Sponsor discovery with Angel Bacher, Director of Human Resources. A question guide, not a script, that asked how the training would carry into behavior and how we would know it worked. Artificial intelligence (AI) notetaker, with permission.	Who knows this workforce well enough to show me where the hardest conversations are?	Treating the first request as the full need, even a well-evidenced one.
2. Explore every option, then let friction talk	I wanted to build an AI practice partner. Cost, account access, and where supervisors spend their day pushed toward a low-tech alternative.	What would make this option fail in their real workday?	Falling for the tool you are most excited about.
3. Offer options; let the choice teach you	Three options with honest tradeoffs, including the AI system. Hope chose the peer practice system.	What does their choice tell me about what they value?	Options that are really one answer and two decoys.
4. Interview the audience: data and buy-in	In-person staff interviews, sponsor not in the room, permission asked every time. Each one also built trust.	Whose workday am I designing for, and who will be skeptical?	Hearing only from people who already agree with the sponsor.
5. Synthesize between rounds	AI synthesized round one into four sections. This led to additional questions and named the voices still missing.	What do I still not know, and who have I not heard from?	Raw transcripts in an AI tool <u>without</u> permission or de-identification.
6. Trace every theme to a design decision	Aftercare, conversation labs, and the Circuit Breaker each came from something staff said. The framework built on their past training (MANDT de-escalation, Brené Brown's Dare to Lead) instead of replacing it.	Can I point to what someone said or an identified need for every distinctive element?	Generic AI output that belongs to no one, and new content that ignores what people already value. Check every output against reality.
7. Hand it back for review	The client caught language that did not fit ("client" vs. "person we support"), a recognizable scenario, and missing values.	Who will tell me when this does not sound real?	Asking for approval instead of asking for review.
8. Build so they can run it without you	Scenario cards, a protocol guide, short director videos, and partner practice. The peer support spaces came from one interviewee's vision.	What happens the month after I leave?	Materials no one uses. Print only what will be used.
9. Plan the follow-through; hand over the measures	Day-of evaluations, an informal 30-day check-in, and what Angel has seen since. Hope's own follow-up staff survey was outside my scope, but known from the start as a potential measure.	What will the client measure after I leave, and have I made it easy for them?	Stopping at day-of reactions. Measures the client never agreed to own.

Trace themes to design decisions

If a distinctive element of your design cannot be traced to something you heard, ask where it came from.

What we heard (theme, in their words)	What we designed (and why)
Example: "Supervisors make promises in conversations but fail to check back in."	Aftercare became a named step: check in within 48 hours, reaffirm, close the loop.

A between-rounds synthesis prompt

A starting template modeled on the structure of the Hope round-one synthesis. Use it only with notes you have permission to analyze, in a tool with training turned off, after removing names and identifying details.

I am designing conversation skills training for ____ (role) at a ____ (size, sector) organization. The request was: " ____." Below are de-identified notes from ____ interviews with ____ (roles).

Using only these notes, organize what you find into four sections:

1. The types of difficult conversations people described, with short examples in their own words.
2. Cultural patterns that make those conversations harder or easier.
3. Elements the training needs to include, and the evidence for each.
4. Adjustments for the next round of interviews: questions that are working, questions to add, and whose perspectives are missing.

Mark anything you inferred rather than read in the notes. Do not include names or any details that could identify a person.

Guardrails for AI in discovery

- ☐ Ask permission before recording or transcribing, every time.
- ☐ Turn off training on every tool you use with client or company material.
- ☐ First names only. No details about the people the client or company serves.
- ☐ Treat AI drafts as drafts. **You review for design quality and content.** The client or sponsor reviews for realism and recognizability.
- ☐ Tell the client/sponsor how you used AI – build trust through transparency. Better yet, agree on it up front. Most are unbothered by AI-assisted design and bothered by discovering it later. Inside an organization, ensure you're following your AI Use Policy.

Choosing the Practice Format

A modality decision tool for interpersonal skills training

Format follows function. Before you choose between a live room, an artificial intelligence (AI) simulation, a job aid, or a blend, write one sentence describing the moment of performance: who is doing what, with whom, under what pressure. Then answer the seven questions below. No single answer decides. The pattern across all seven does.

The moment of performance:

Question	Points toward live peer practice when...	Points toward AI simulation when...	Points toward a job aid or something else when...
1. What kind of change is required?	The change is interpersonal: feedback, conflict, difficult conversations, delegation. These need practice with feedback from a person.	The change is interpersonal and the learner already has the model. They need repeated practice saying the words out loud or experimenting with different ways to say them.	The change is procedural or informational. A checklist or reference card may do the whole job.
2. How often does the performance occur?	Rarely, and the stakes are high. Depth, observation, and a group naming the pattern matter more than volume.	Often. Volume and repetition matter, and a room cannot provide enough practice rounds.	So rarely that practice will fade before use. Support the moment of performance instead.
3. Does the learner need to feel real social risk?	Yes. A colleague watching is the point. A simulation cannot reproduce the stakes of being seen.	No, or not yet. Privacy lowers the barrier for people who freeze in front of peers or stumble over words.	Social risk is not part of the skill.
4. Is trust in the group itself an objective?	Yes. Shared vulnerability in a room builds something a private simulation cannot. People call each other afterward.	No. Learners are dispersed, do not work together, or the cohort will not persist.	Not applicable.
5. How specific is the content to this culture?	Highly local. Vocabulary, hierarchy, pressure sources, and physical settings are particular to this organization.	Generic enough that a well-built character reads as real across organizations, or the platform can be configured with local detail.	The content is stable and factual. Write it down.
6. Who is the audience, and where are they?	Co-located or gathered on a schedule. Access to technology is uneven. Not everyone works at a screen.	Dispersed, shift-based, or remote. Scheduling a room is the hardest part.	Anyone, anywhere, at the moment of need.
7. What can the client sustain after you leave?	Printed cards, a protocol guide, and peer facilitators cost nothing next year. Someone inside will own it.	A budget line, a platform owner, and data terms exist. Transcripts, retention, and who sees results are settled.	A document owner exists. It will be updated when the process changes.

Tally the column each answer lands in. Three or more in one column is a strong signal. A split between the first two usually means a blend, in sequence (next page).

Sequencing: it is rarely either/or

Live practice and simulation do different jobs. When both fit, sequence them rather than choosing one. One pattern:

1. Build the model and the container live

Teach the framework, set the agreements, and run the first practice round in the room, where a facilitator can see how people are reacting and a peer can say "me too."

2. Assign simulation practice between sessions

Volume and privacy. The same conversation with a defensive responder, a silent one, and a tearful one, for example. Nobody is watching, so nobody performs.

3. Return to the room for the harder version and discussion

Higher stakes, human observation, and a group debrief that names the pattern. A simulation completed and never discussed produces an experience, not a change in behavior.

How one client answered

Hope Community Resources, an Alaska nonprofit supporting people with intellectual and developmental disabilities, asked for conversation skills training for about 35 frontline supervisors and directors. The seven questions pointed to the in-person room:

Kind of change	Interpersonal: hard conversations with staff, guardians, medical teams, and their own directors.
Frequency	Daily, across a 24/7 operation.
Social risk	Supervisors resisted role-play and said they could handle it. Practice needed a peer structure that felt safe: conversation labs in trios.
Trust in the group	An objective. Hope values consistency across leaders and avoiding silos; a team from another region traveled in for one shared day.
Cultural specificity	High. Guardians, relief coverage, de-escalation training they already had, values lived as daily behaviors, including in how they support the people they serve.
Audience and place	Supervisors work in homes, in the community, and in the art studio, not at screens.
Sustainability	A nonprofit budget. Scenario cards, a protocol guide, and short videos with no ongoing cost; directors facilitate.

Using AI as a design tool: the guardrails

- ☐ Ask permission before recording or transcribing any conversation, every time, and record that you asked.
- ☐ Turn off training on every tool you use with client/company material. Confirm the setting, do not assume it.
- ☐ Strip identifiers before analysis: first names only, no client or family details, no compensation or employee relations content.
- ☐ Treat AI-drafted scenarios as first drafts. The client/sponsor reviews for realism and safety and asks for edits.
- ☐ Agree on your AI use with the client or sponsor up front, and put it in writing. Most are unbothered by AI-assisted design and bothered by discovering it later. Inside an organization, follow your organization's AI use policy.

Practice Scenario Design Worksheet

From "we need communication training" to practice that changes behavior

How to use this worksheet. Work from one real conversation your people avoid. If you have discovery or needs-analysis data, use it. If you do not, use the request you hear most often and note how you would confirm it. Rough is fine. You will pressure-test this with a partner, then revise. The scenario you leave with should be usable in peer role-play, a facilitated lab, or an artificial intelligence (AI) simulation, with the same design underneath.

Part 1: The conversation

Which conversation do your people struggle with most? Name the specific conversation, not the topic.

Example: "A lead who covers every weekend for a staff member who calls out, and has never raised it." Not: "accountability."

How do you know? What evidence points to this conversation rather than the one leadership named?

Interview quotes, exit data, human resources (HR) case patterns, what supervisors say in the hallway. If the answer is "the sponsor told me," write down how you would verify.

What does it cost when this conversation is avoided or goes badly?

Relational costs that are hard to reverse count too: a person who stops volunteering ideas, a rumor that reaches a peer three weeks later, a good employee who leaves.

What have your people already learned that this can build on? Prior training, shared language, values.

Anchor the new to the familiar. At Hope, the framework built on de-escalation training everyone had and a leadership program their directors had done.

How will you know it worked back on the job, and who will check after you leave or move on to another project?

Ask this in discovery, not at the end. Name a measure the client/sponsor already tracks or has agreed to own.

Part 2: The people

People, not roles: a made-up name, a role with enough history to imply a past, a want, a pressure, and one specific, non-decorative detail.

The conversation holder (who practices)	The other person
Name and role	Name and role
Tenure and history	Tenure and history
What they want from this conversation	What they want, and their mood walking in
What pressure they are under	One thing they will not concede easily
One specific detail	What they are right about

Part 3: The friction

What makes this conversation hard? Name the competing needs, the incomplete information, or the options that are all imperfect.

The strongest decision points are about sequence and timing: not "what do I say," but "what do I say first."

What could escalate it? What does the other person do or say that makes it more tense?

Emotionally real, psychologically safe. Check each before you use this scenario with learners.

- ☐ It is a composite. Details are changed until no one who lived the real situation could recognize it.
- ☐ No real names, no identifying details about clients, families, or the people your organization serves.
- ☐ No harassment, discrimination, violence, substance use, grief, or burnout without added facilitation guardrails.
- ☐ A learner can pass, pause, or swap roles without explanation.
- ☐ Set where it really happens: a hallway, a vehicle, a break room, a phone call.

Part 4: What "done" looks like

What would an observer see or hear if the conversation holder did this well? Describe behavior, not feelings.

Example: names the specific behavior and its impact without editorializing, asks one open question and waits, states a clear next step with a date.

Stopping condition for a practice round

Behavior or time, whichever comes first. Example: "until the holder has named the behavior and its impact, or four minutes."

Observer lens: two or three things to watch for

Give the observer a focus, not a scorecard. "What did you notice about the opening 30 seconds? Where did the tone shift?"

Part 5: The debrief, in order

The conversation holder speaks first about what they noticed in themselves. The other person says how the conversation felt from their side. The observer adds what they saw from outside. Write at least one question for each of the participants.

To the conversation holder:

To the other person:

To the observer:

Part 6: Delivery choice

Use the Modality Decision Tool in your packet. Format follows function. Check what fits this scenario, this audience, and what your organization can sustain after the program ends.

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|---|--|
| ☐ Peer role-play in trios (holder, other person, observer)
☐ Facilitated conversation lab with coaching
☐ Other: | ☐ AI simulation for private, repeated practice
☐ A blend, in sequence: learn it together, practice alone in simulation (AI), come back together for discussion and a harder live round (virtual or in-person) |
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Why this format, for these people?

Pressure test · For your partner

Read their worksheet silently. Then ask these questions out loud.

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| ☐ Would this actually happen in that role, in that industry?
☐ Would getting it wrong cost something important?
☐ Is the other person right about something?
☐ Is the hard part what to say first, not only what to say? | ☐ Could anyone who lived the real situation recognize it? If yes, it is not done.
☐ Is "done" something an observer could see or hear?
☐ Could a new supervisor run this without the designer in the room? |
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From a real project: the client recognized whose story a scenario came from, even with names removed. One detail was removed and the scenario stayed. If anyone who lived it could recognize it, it is not done.

Then act out the first 60 seconds. The designer plays the conversation holder. The partner plays the other person, using the brief in Part 2. Stop at one minute. Feedback in two sentences:

"What I heard that was strong was..."

"One thing to consider is..."

Revision notes: what changed after someone else read it?

My commitment: the first conversation I will have back at work, and with whom.
